



## Conditional Eligibility Extract Job Aid for Certified Insurance Agents

### Conditional Eligibility

Covered California consumers in a conditional eligible status will receive a [reminder notice](#) from Covered California that informs them they need to provide documents to prove they are eligible to continue their health insurance and/or financial assistance through Covered California.

For more information on the Conditional Eligibility notice and next steps for consumers in a conditional eligibility status, review our [Conditional Eligibility Quick Guide](#).

### Conditional Eligibility Extract – How You Can Help

Help consumers maintain their APTC and/or coverage by reminding them to upload verification documents. We are now making it easier for you to identify your consumers that have conditional eligibility.

Within your [Agent Extranet](#) account, a monthly report of your Covered California conditionally eligible consumers is provided. The report is titled: **Conditional Eligibility File**. If you log into your Agent Extranet account and you don't see a file, then none of your consumers are conditionally eligible for that month.

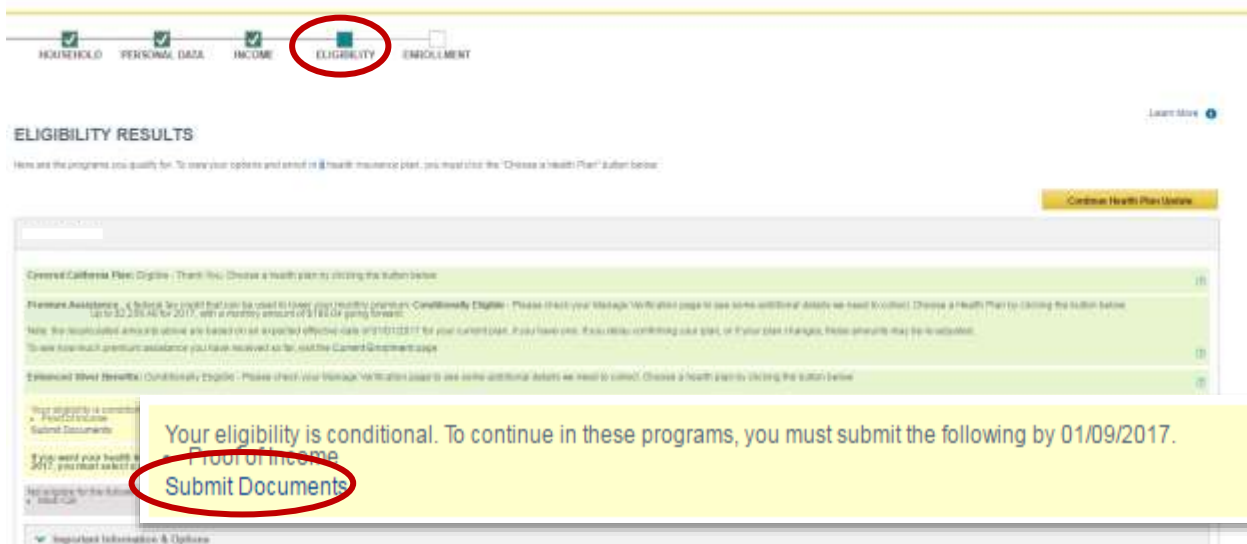
2017 Month	Extract Available
January	1/9/17
February	2/6/17
March	3/6/17
April	4/10/17
May	5/8/17
June	6/5/17
July	7/10/17
August	8/7/17
September	9/11/17
October	10/9/17
November	11/6/17
December	12/11/17

The Conditional Eligibility report is provided as an Excel document, giving the flexibility to sort, and manipulate data to assist consumers in your Book of Business. Remind consumers to submit [acceptable documentation](#) to clear their conditional eligible status or help them upload their documents. Each month's extract file contains consumers that have:

- Not submitted documentation – Remind or help these consumers submit their documents.
- Submitted documentation, but they have not yet been processed by Covered California.
  - If the requested documents were previously uploaded via the **“Submit Documents”** link (check the documents and correspondence section on the consumer's home page), the consumer can call the Consumer Service Center at 800-300-1506 and request the documents be verified over the phone.
  - If the requested documents were submitted via fax or mail and are not displayed in the documents and correspondence section, no action is needed, see below for more info.

The **Conditional Eligibility File** will not contain consumers that have passed **ALL** conditional eligible categories, no action is needed.

The **“Submit Documents”** link is found on the **Eligibility Results Page** on a consumer’s account who is in a conditional eligibility status. This section is highlighted in yellow. If the **“Submit Documents”** link is available, use the link to upload the requested documents.



HOUSEHOLD PERSONAL DATA INCOME **ELIGIBILITY** ENROLLMENT

**ELIGIBILITY RESULTS**

Here are the programs you qualify for. To view your options and enroll in a health insurance plan, you must click the "Choose a Health Plan" button below.

[Continue Health Plan Update](#)

**Choose a Health Plan** (Thank You) Choose a health plan by clicking the button below.

**Medicare Assistance:** Select a health plan that can be used to cover your monthly premium. **Conditionally Eligible:** Please check your Message Verification page to see some additional details we need to collect. Choose a Health Plan by clicking the button below.

Note: the calculated amount above are based on an expected effective date of 01/01/2017 for your current plan. If you have one. If you have one, confirm your plan, or if your plan changes, these amounts may be re-calculated.

To see how much premium assistance you have received as far as the Current Enrollment page.

**Extended Basic Benefits:** Conditionally Eligible: Please check your Message Verification page to see some additional details we need to collect. Choose a Health Plan by clicking the button below.

Your eligibility is conditional.

**Submit Documents**

**Your eligibility is conditional. To continue in these programs, you must submit the following by 01/09/2017.**

**Proof of income**

**Submit Documents**

[Important Information & Options](#)

## Understanding the Conditional Eligibility Extract

The report identifies 6 categories that may lead to the consumer’s conditional eligibility status:

1. Income
2. Incarceration
3. Social Security Number
4. Citizenship
5. Lawful Presence
6. American Indian/Alaskan Native

The values under each conditional eligible category are defined as:

- “No Document” – consumer is in a conditional eligibility status – action needs to be taken
- “Document Uploaded” – A document was uploaded, *but* the consumer has not yet had eligibility cleared by Covered California – no action is needed, Covered California will contact the consumer with any questions
- “Pass/E-Verify” – the consumer has been cleared for that particular inconsistency – no action is needed
- Left Blank – there is *no* inconsistency for that eligibility condition – no action is needed



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The Conditional Eligibility report will display the values in this format:

Income	Incarc	SSN	Citz	Lawful_Presence	AMER_IND
No Document				Document Uploaded	
Document Uploaded					
Pass/E-Verified		No Document			
No Document					
Document Uploaded					
Pass/E-Verified			No Document		

### Example:

A consumer is inconsistent for Income, Social Security Number (SSN), and Citizenship on the current month's file:

Name	Income	INCARC	SSN	CITZ	Lawful_Presence	AMER_IND
John Doe	No Document		No Document	No Document		

If the consumer submitted SSN and Citizenship documentation, the following month's file will display:

Name	Income	INCARC	SSN	CITZ	Lawful_Presence	AMER_IND
John Doe	No Document		Document Uploaded	Pass/E-Verify		

In this scenario, the Citizenship documents have been verified, but the SSN documents have not yet been processed. The consumer has not submitted any income documents.

### Validate a Consumer's Eligibility Status

Once a consumer provides documentation and the documents have been **Passed/E-Verified**, they are no longer in a conditionally eligible status.

The Eligibility Results Page will no longer display the **"Submit Documents"** link and the section will be highlighted in green:

Covered California Plan: Eligible - Thank You. Choose a health plan by clicking the button below

**Premium Assistance**, a federal tax credit that can be used to lower your monthly premium: **Eligible**  
Up to \$816.00 for 2016, with a monthly amount of \$68.00 going forward

To see how much premium assistance you have received so far, visit the [Current Enrollment](#) page

Not eligible for the following:

- Medi-Cal
- Enhanced Silver Benefits



## Conditional Eligibility Extract Job Aid for Certified Insurance Agents

### Personally Identifiable Information (PII)

The Conditional Eligibility Extract contains a client's Personally Identifiable Information. Any PII found within the Agent Extranet must remain secure and confidential in accordance with Covered California's [agent agreement](#) and all applicable laws and regulations. It is the Agent's responsibility to ensure that they handle this information in the appropriate manner.

### Fields included on the Conditional Eligibility Extract

The Conditional Eligibility Extract contains the following fields, if applicable:

- Case ID
- Carrier
- Coverage Start Date
- Full Name
- Gender
- County
- Zip Code
- Address, Email, Home Phone Number
- Preferred Language
- Mixed Household designation
- Agent License Number
- Conditionally eligible category:
  - Income
  - Incarceration
  - Social Security Number
  - Citizenship/Lawful Presence
  - American Indian/Alaskan Native
- Conditionally Eligible Reasonable Opportunity Expiration Date (ROP)